



DSD Business Systems

Sage 100 Enhancements

BM42

35 Option Categories

BM-1042

Version 5.30



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35 Option Categories User's Manual
Version 5.30

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule*
- Purchasing Information*
- Installation Instructions*
- Product Support*
- Enhancement Links*

BM42 35 Option Categories:

<http://www.dsdinc.com/enhancement/35-option-categories-2/>

The product web page contains:

- Product Description*
- Web Links*
- Current Product Version Table*
- Product Installation File Download*
- Product Manual in .pdf Format*
- Revision History*
- FAQ*

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is 858-550-5900. Fax: 858-550-4900.

For a hard error, where the program displays an error dialog, report:

- Error number.*
- Program name.*
- Line number.*
- Program version.*

*Exact sequence that caused the error, including menus and menu selections.
Other pertinent information.*

If leaving a message or faxing, please include:

Your name.

Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system with Symantec PCAnywhere or by some other means access or duplicate the system.

35 Option Categories Features

This DSD Extended Solution to the Sage 100 Bill of Materials module adds Categories A - Z and expands the Options Codes list to allow entry of the 35 categories.

Section B: Getting Started



- If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- Check with DSD before installing more than one Enhancement.

Required Levels

Sage 100 Module	Module Required	Required Level
B/M	Y	5.30

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels must match those listed above.
3. **Run Enhancement Setup Program:** Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. **Send your Sage Serial Number to your DSD Representative:** Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using

Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD *and then proceed to unlock all enhancements contained in the file.*

- *The Sage 100 system that is being used must have web access for this option to be effective.*
- *You can send your Sage Serial Number to your DSD Enhancements sales representative.*

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

*Note: You can also unlock a DSD Enhancement through the DSD Enhancement Control Panel found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.*

7. **Convert Data:** After registration, the Data Conversion window will appear. Follow on-screen instructions to complete data conversion. *You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.*

DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The DSD Enhancement Control Panel is accessed from the Library Master Utilities menu.

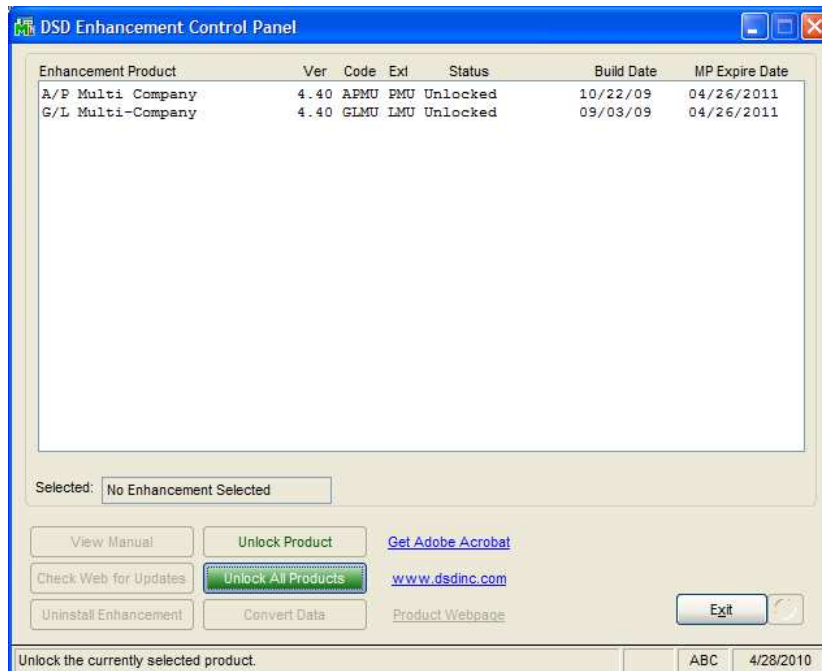
The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an FTP web connection on the Sage 100 system.*

Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*



Convert Data: After verification, the selected Enhancements data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.

Help: The Help button, located at the bottom right of the window, opens an HTML help file .

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system.

There are also links to the DSD website and the Enhancement page on that site.

Section C: Setup

Upon completion of software installation, you will need to access DSD Extended Solutions Setup from the Bill of Materials Setup menu. Select this part number and the Setup screen for this Extended Solution will appear. Check the 'Enable DSD Extended Solution' box to activate this Extended Solution.

The screenshot shows a software setup window titled "BM-1042 Setup Options" with the Sage logo in the top left corner. The main heading inside the window is "35 Option Categories". Below this heading, there is a checkbox labeled "Enable DSD Extended Solution" which is currently checked, and the text "Level 5.30" is displayed to its right. At the bottom of the window, there are two buttons: "Accept" and "Cancel". Below these buttons, there is a checkbox labeled "Check this box to enable 35 Option Categories". To the right of this checkbox, there are three small boxes containing the text "DSD", "XYZ", and "11/21/2016".

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Section D: System Operations

This Extended Solution adds 26 more Option Categories to Bill of Materials: A-Z. These additional Option Categories will be functional in the Bill of Materials and Sales Order modules, and only as described below. These additional option categories will be defined to all data dictionaries.

Bill Of Materials Maintenance

Bill Of Materials Maintenance will be modified with a new button, 'Categories A to Z'. It will only be available if you have checked the 'Bill Has Options' box.

Bill of Materials Maintenance (ABC) 1/23/2011

Bill Number: A-1000

Description 1: Ashley Super Coupe

Description 2: Custom Design

Bill Type: Standard

Drawing Number: 145667

Drawing Revision: 050

Routing Number:

Date Last Used: 11/30/2010

Maximum Lot Size: 10

Print Components: ☐

Bill Has Options: ☒

Option Categories:

1	Color	☒	Required
2	Engine	☒	Required
3	Wheel	☒	Required
4	Tire	☒	Required
5	Cover	☐	Required
6	Mirror Style	☐	Required
7	Stereo	☐	Required
8	Speakers	☐	Required
9	GPS	☐	Required

Categories A to Z

Accept Cancel Delete

When you click this button, a new window with 'Option Categories A to Z' will be displayed. These categories will have the same functionality that is currently present for Categories '1' through '9.'

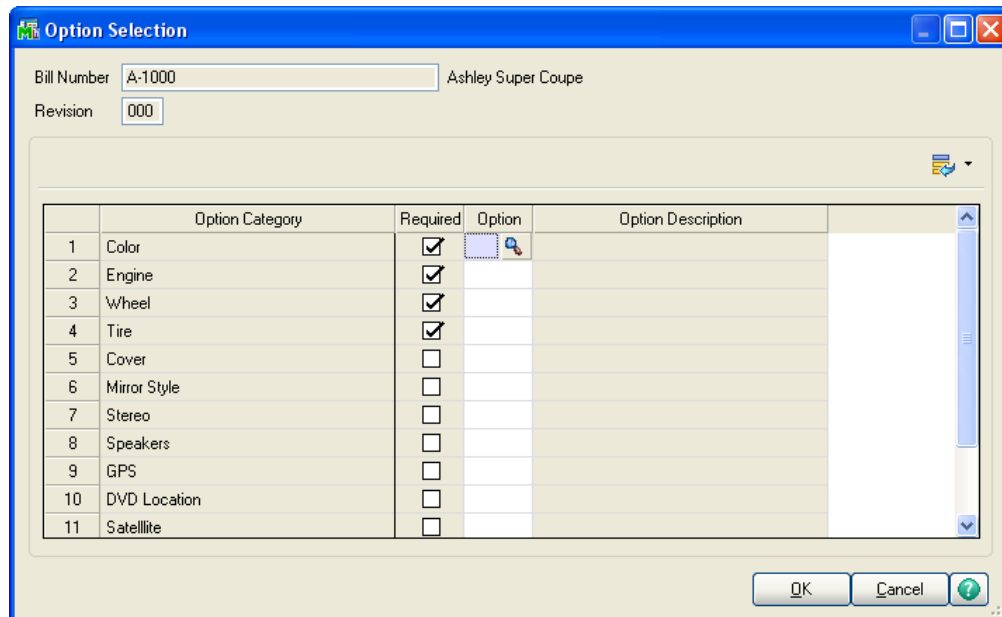
Option Categories A to Z

A	DVD Location	☐	Req'd	N		☐	Req'd
B	Satellite	☐	Req'd	O		☐	Req'd
C	Sunroof	☐	Req'd	P		☐	Req'd
D	Warranty	☒	Req'd	Q		☐	Req'd
E		☐	Req'd	R		☐	Req'd
F		☐	Req'd	S		☐	Req'd
G		☐	Req'd	T		☐	Req'd
H		☐	Req'd	U		☐	Req'd
I		☐	Req'd	V		☐	Req'd
J		☐	Req'd	W		☐	Req'd
K		☐	Req'd	X		☐	Req'd
L		☐	Req'd	Y		☐	Req'd
M		☐	Req'd	Z		☐	Req'd

OK

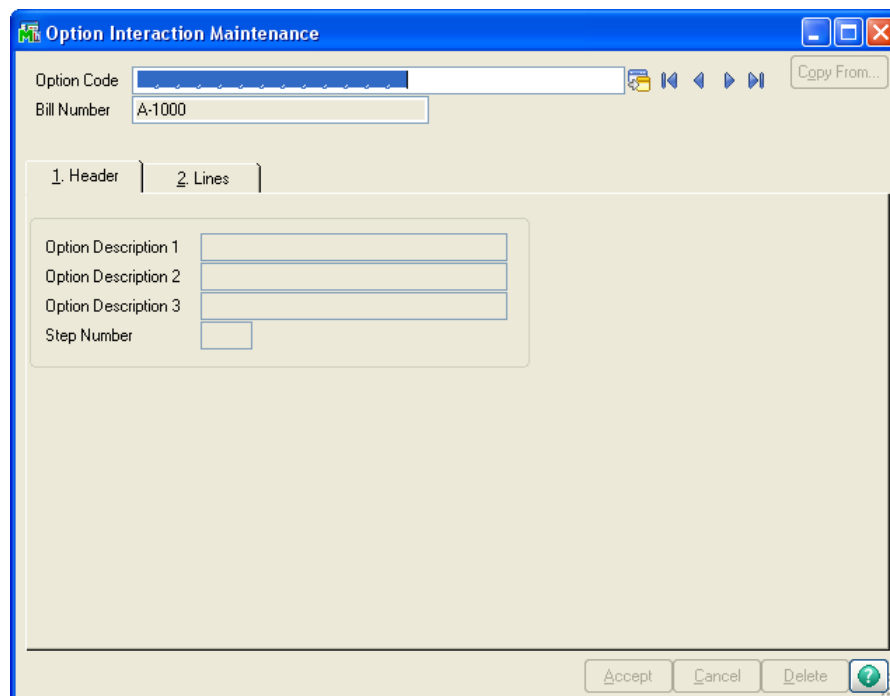
Option Interaction Maintenance

The Option Selection tab in Option Interaction Maintenance allows for entry of the new Categories and will display all of the selected Option Codes in an expanded Option Codes selected field.



The Option Selection dialog box is used to select option categories for a specific bill number. It features a title bar with standard window controls. Below the title bar, there are input fields for 'Bill Number' (containing 'A-1000') and 'Revision' (containing '000'). To the right of these fields, the text 'Ashley Super Coupe' is displayed. The main area of the dialog contains a table with the following columns: 'Option Category', 'Required', 'Option', and 'Option Description'. The table lists 11 categories, each with a corresponding 'Required' checkbox and an 'Option' field. The 'Option' field for the first category, 'Color', is highlighted with a blue selection box. At the bottom right of the dialog, there are 'OK', 'Cancel', and a help icon button.

	Option Category	Required	Option	Option Description
1	Color	☒		
2	Engine	☒		
3	Wheel	☒		
4	Tire	☒		
5	Cover	☐		
6	Mirror Style	☐		
7	Stereo	☐		
8	Speakers	☐		
9	GPS	☐		
10	DVD Location	☐		
11	Satellite	☐		



The Option Interaction Maintenance dialog box is used to maintain option codes. It features a title bar with standard window controls. Below the title bar, there are input fields for 'Option Code' (containing a blue selection box) and 'Bill Number' (containing 'A-1000'). To the right of these fields, there are navigation buttons (back, forward, search, etc.) and a 'Copy From...' button. The main area of the dialog contains a tabbed interface with two tabs: '1. Header' and '2. Lines'. The '1. Header' tab is currently selected. Below the tabs, there are input fields for 'Option Description 1', 'Option Description 2', 'Option Description 3', and 'Step Number'. At the bottom right of the dialog, there are 'Accept', 'Cancel', 'Delete', and a help icon button.

Production Entry

Production Entry will prompt for these additional Option Categories. Once Options have been defined, they will display in the Option Code field. This field will be expanded to hold 102 characters (34, 2 character codes plus 34 commas). They will print on the Production Entry Register.

Production Entry (ABC) 2/2/2011

Production Number: 0000005

Production Date: 2/2/2011

Bill Number: A-1000

Bill Type: Standard

Option Code: 01,01,01,04,,01

Quantity: .00

Unit of Measure: EACH

Effective Date: 2/2/2011

Parent Warehouse: 000 CENTRAL WAREHOUSE

Component Warehouse: 000 CENTRAL WAREHOUSE

Explode Sub-Assemblies: ☐

Buttons: Accept, Cancel, Delete, Print

Picking Sheet Printing

Picking Sheet Printing will prompt for these additional Option Categories and will display the expanded Option Code field described above. The additional selected Option Codes will print on the Crystal Picking Sheet Form.

BOM Reports

The following Reports will use the new Option Categories:

- Single Level Bill of Materials*
- Indented Bill of Materials*
- Summarized Bill of Materials*
- Component Requirement**
- Gross Requirements**
- Costed Bill of Materials
- Production Register
- Production History Report*
- Single Where Used Report
- Indented Where Used Report

- * These reports print an Option Recap at the top of the report
- ** These reports allow for entry of Options on the report selection screen

NOTE: Only Options 1-9 and A-E are added to the CRW Form for the above reports. If you need to have more added to these forms, please contact DSD Business Systems.

EXAMPLE:

Single Level Bill of Materials

Single-Level Bill of Materials Report
With Phantom Blow Through

ABC Distribution and Service Corp. (ABC)

Bill Number	Option	Type	Unit of Measure	Description						
A-1000	BASE	STD	EACH	Ashley Super Coupe Custom Design						
Option Categories										
	Required	1	Color							
	Required	2	Engine							
	Required	3	Wheel							
	Required	4	Tire							
		5	Cover							
		6	Mirror Style							
		7	Stereo							
		8	Speakers							
		9	GPS							
		10	DVD Location							
		11	Satellite							
		12	Sunroof							
	Required	13	Warranty							
			Max Lot Size	10						
			Last Used: 1/25/2011							
			Drawing: 145667							
			Revision: 050							
Component Item Code	Type	Quantity Per Bill	Unit of Measure	Description	Add Date	Engineering Change Number	Delete Date	Engineering Change Number	Find Number	Step Number
8953		1.00	EACH	UNIVERSAL 3 1/2" SSD FLEX DSK						
8971		1.00	EACH	UNIVERSAL 5 1/4" SSD FLEX DSK						

Bill Number	Option	Type	Unit of Measure	Description						
A-1000	1-01	STD	EACH							
			Max Lot Size	10						
			Last Used: 1/25/2011							
			Drawing: 145667							
			Revision: 050							
			Price:	0.00						
Component Item Code	Type	Quantity Per Bill	Unit of Measure	Description	Add Date	Engineering Change Number	Delete Date	Engineering Change Number	Find Number	Step Number
8953		1.00	EACH	UNIVERSAL 3 1/2" SSD FLEX DSK						

Bill Number	Option	Type	Unit of Measure	Description						
A-1000	2-01	STD	EACH							
			Max Lot Size	10						
			Last Used: 1/25/2011							
			Drawing: 145667							
			Revision: 050							
			Price:	12.00						
Component Item Code	Type	Quantity Per Bill	Unit of Measure	Description	Add Date	Engineering Change Number	Delete Date	Engineering Change Number	Find Number	Step Number

Single Level Component Requirement

Component Requirement Report (ABC) 1/27/2011

Report Setting: STANDARD Save

Description: Component Requirement Report

Setting Options

Type: Public Print Report Settings ☐ Number of Copies 1 Collated ☒

Default Report ☒ Three Hole Punch ☐

Print Shortages Only ☐ Round Extended Quantity for Integer Units of Measure ☐

Quick Row: 1 Print Preview Setup

	Bill Number	Bill Options	Bill Format	Quantity	Effective Ch
1	A-1000	01.01.01.04	Single	1.00	1/25/2011
2				.00	

Description 1: Ashley Super Coupe
Description 2: Custom Design
Component Whse: 000
Bill Type: Standard

Bulzip PDF Printer Keep Window Open After ☐ Print ☐ Preview ☐ Print Preview Setup

Single-Level Component Requirement Report
Options <01,01,01,04,> As of 1/25/2011, Warehouse: 000
ABC Distribution and Service Corp. (ABC)

Bill Number	Option	Type	Description	Unit of Measure	Quantity Required
A-1000	BASE	Standard	Ashley Super Coupe	EACH	1.00
			Custom Design		
	1-01		Ashley Super Coupe	Color	
			Custom Design		
	2-01		Ashley Super Coupe	Engine	
			Custom Design		
	3-01		Ashley Super Coupe	Wheel	
			Custom Design		
	4-04		Ashley Super Coupe	Tire	
			Custom Design		
	01		Ashley Super Coupe	Warranty	
			Custom Design		

Component Item Code	Type	Description	Unit of Measure	Quantity Per Bill	Quantity Required	Quantity Available	Quantity Short
2568-3-25		DESK FILE 3 1/2" CAP 25	EACH	9.00	9.00	925.00	

Sales Order Entry and Sales Order Invoice Entry

Order Entry and Sales Order Invoice Entry will be modified to prompt for the additional Option Categories in a manner consistent with what was described for Production Entry.

Option Selection

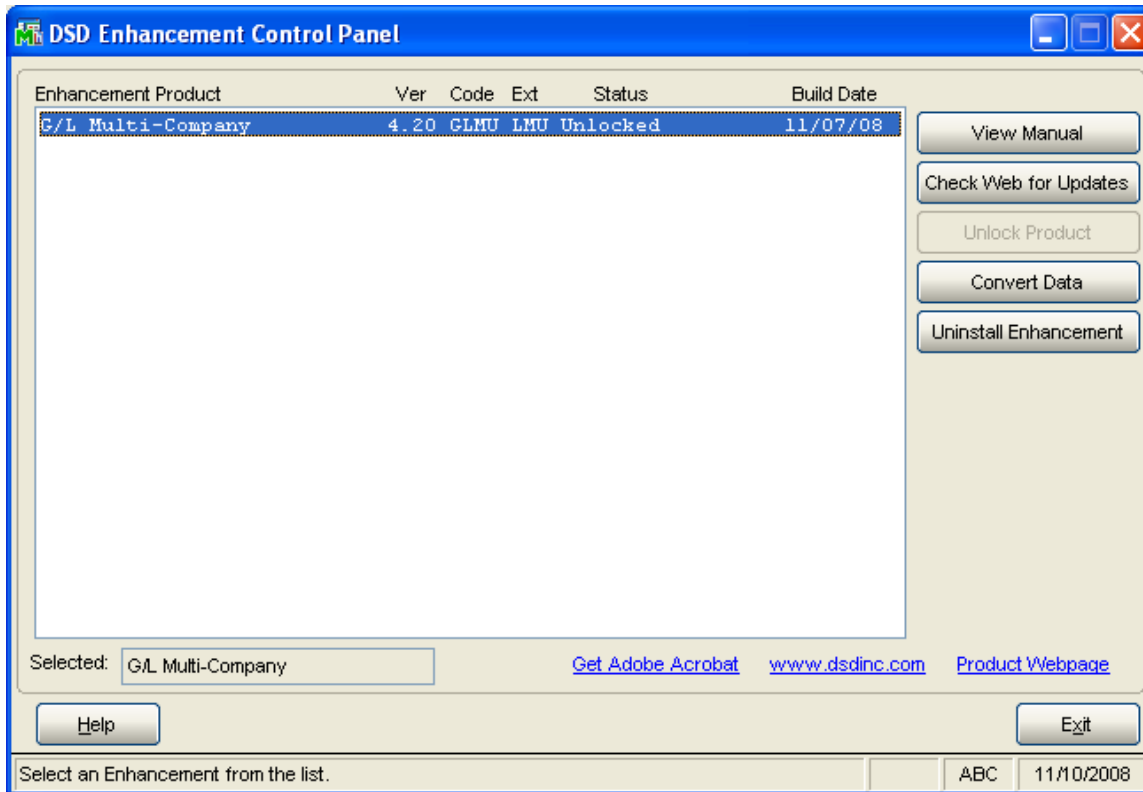
Bill Number: A-1000 Ashley Super Coupe
Revision: 000

	Option Category	Required	Option	Option Description
1	Color	☒		
2	Engine	☒		
3	Wheel	☒		
4	Tire	☒		
5	Cover	☐		
6	Mirror Style	☐		
7	Stereo	☐		
8	Speakers	☐		
9	GPS	☐		
10	DVD Location	☐		

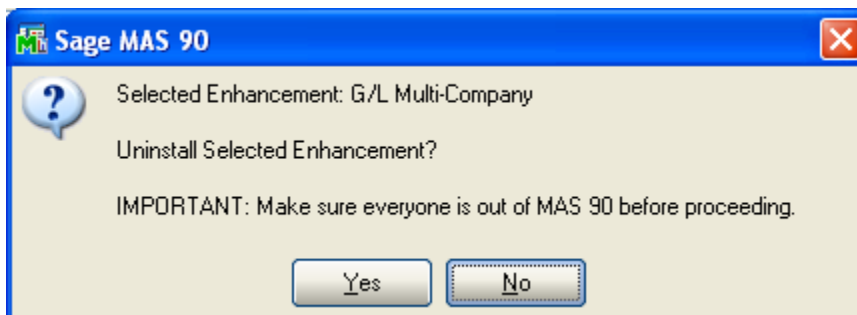
OK Cancel ?

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

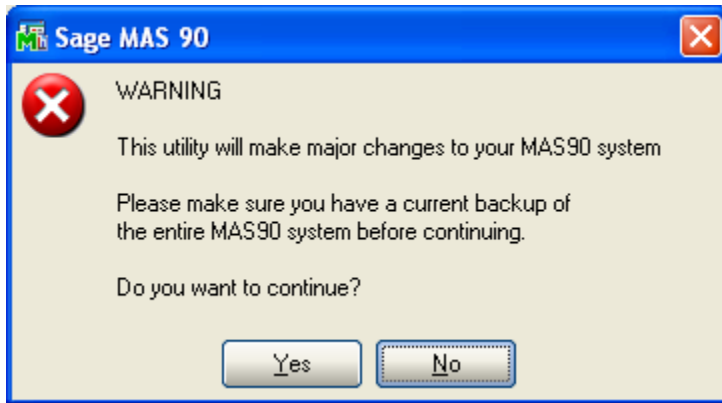


When accessing the **DSD Utility Suite**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, to remind you that a complete backup of your entire MAS90 system should be completed prior to uninstalling a DSD product.

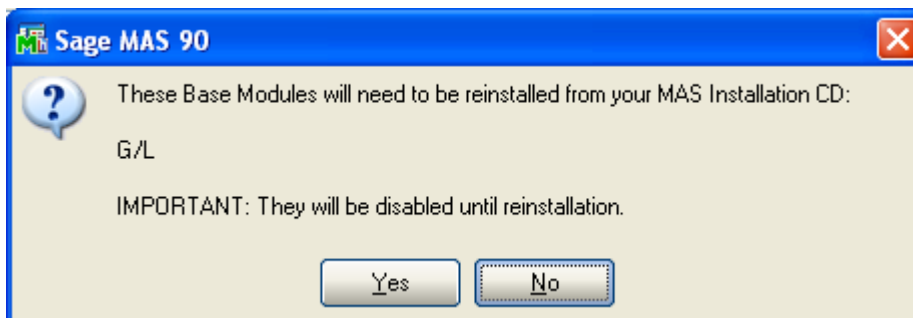


Select No to exit the Uninstall Process.

Select Yes to continue with the Uninstall Process.

After the Uninstall of the DSD Enhancement, you **MUST** reinstall certain standard Sage 100 modules, followed by reinstallation of MAS Service Packs / Updates, if applicable.

The following message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.



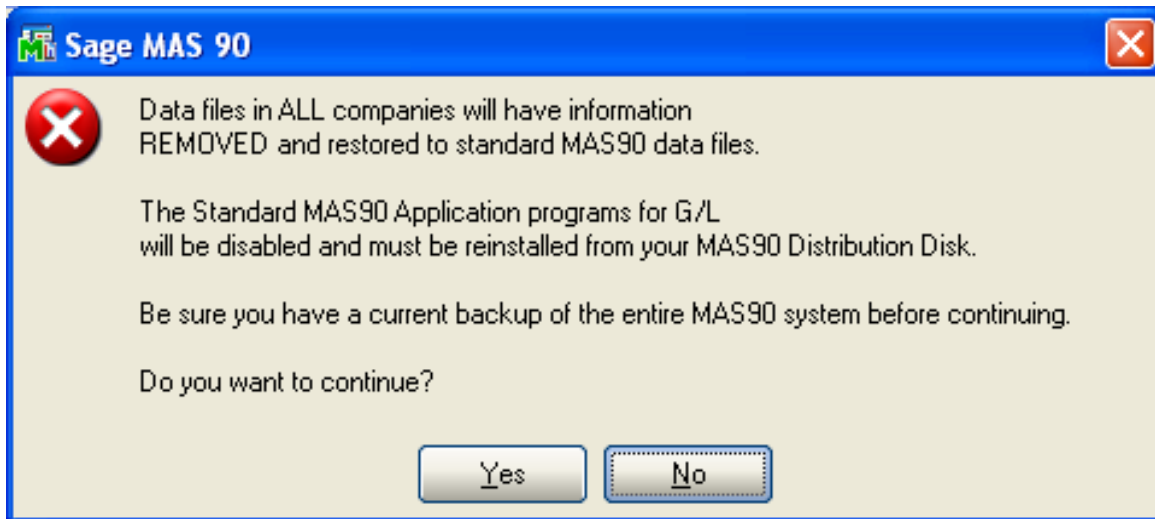
Select No to exit the Uninstall Process.

Select Yes to continue with the Uninstall Process.

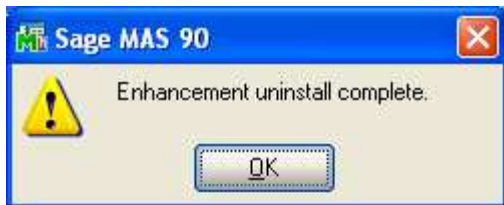
The following message box will appear, displaying the final warning message.

Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.



After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).

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